

Title: Senior Life Insurance Case Manager
Location: La Jolla/UTC

Summary:

San Diego based Life Insurance Brokerage is seeking a highly motivated and organized individual with brokerage general agency or life insurance carrier case management experience. Candidate must be a team player and possess ability to handle a high volume workload with a strong sense of urgency. Company culture is quick turn around and customer centric.

Duties and Responsibilities:

- Provide full case management support on formal and informal life insurance cases.
- Negotiate with carriers for approvals/improved offers.
- Utilize financial underwriting knowledge to secure large lines of coverage.
- Assist agent in determining goals, needs, and best processing path.
- Communicate complex carrier concepts, nuances, and niches to provide agent best carrier fit for client.
- Determine if underwriting assessment will meet pricing goals and recommend carriers.
- Build strong relationships with carrier contacts and underwriters to obtain results needed to procure best offer.

Desired Skills/Experience:

- Minimum of 5 years life insurance case management experience in a brokerage general agency or life insurance carrier.
- Demonstrated ability to effectively work and communicate with agents, carriers and internal customers resulting in excellent customer service.
- Extensive knowledge of case management processing, carrier underwriting requirements, new business processes and forms in a brokerage general agency environment.
- Strong knowledge of life insurance products and illustrations.
- Ability to complete tasks timely, efficiently and with a high degree of accuracy and urgency.
- Demonstrated experience in handling confidential and sensitive information.
- Detailed oriented and proven ability to multi-task.
- Ability to work in a cross-functional team environment.
- Understanding of reinsurance markets, carrier retention and capacity limits.
- Experience utilizing agency management system.

For immediate consideration, please submit resume and salary requirements to careers@thepg.com.